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METHOD AND SYSTEM FOR INTERFACING CLIENTS WITH RELATIONSHIP MANAGEMENT (RM) ACCOUNTS AND FOR PERMISSIONING MARKETING

ABSTRACT

A system and method for interfacing a client with a client relationship management (RM) account database. The client RM account database includes an entry for the client, and the entry for the client includes a fields of data. The RM provides an environment for product and relationship management to jointly conduct client analysis, planning and delivery in a coordinated and measurable fashion. The RM includes user terminals for use by relationship managers and product managers. A network communicatively couples the user terminals, which is in turn coupled to a server.